

Download Certification Roster

The purpose is to allow the agency administrator or school users to download the Certification Roster to their computer for the TSAA Grant, HOPE, HOPE Access, and Wilder-Naifeh aid programs.

Steps:

1. The user selects Certification from the standard menu.
2. The Select a Program screen is displayed.
 - a. If an Agency user, the Select School screen will be displayed and the user must select a school
3. The user selects an aid program:
 - a. TSAA Grant
 - b. HOPE
 - c. HOPE Access
 - d. Wilder-Naifeh
4. The Select Academic Term screen is displayed.
5. The user selects the term for which they wish to download the certification roster.
6. The user selects the [Download Roster] button.
7. The Verify Criteria screen is displayed (which serves as a confirmation screen).
8. The user verifies the Program and Term selected.
 - a. If an Agency user, the user will also verify the School selected.
 - b. The user can make changes as needed before proceeding.
9. The user presses the [Download File] button.
10. The File Request screen is displayed.
 - a. If an Agency user, the school selected will be displayed.
11. The user is redirected to the File Processing Information screen throughout the download process for status and completion information.
12. The file is downloaded.
13. The user can select to open the file from the File Request Screen.
14. From the File Processing Information screen, the user may return to the File Request screen by pressing the [File Request] button.

Business Rules:

1. A program is displayed on the Select Program screen if the agency administrator or school user has security level "400 or 500" for the program.
2. A term is displayed in the drop-down on the Select a Term screen if the current date is greater than or equal to the term's Certification Available date.
3. A student is contained in the file if the school is listed as their current institution for the selected term and they are in a status of "Ready to Certify."
 - a. For TSAA grants, a student is also contained in the file if the school is listed as their current institution for the selected term and they are in a status of "Paid" for payment amount "0" with batch number "PDSUMMER" **and** another term within the acyear has been certified as Not Enrolled, Unsatisfactory Progress, Over Award, or Less Than Half Time
4. The [Download Roster] button is only available for the TSAA Grant, HOPE, HOPE Access, and Wilder-Naifeh aid programs.
5. If the user attempts the download process without selecting a term, the system will display the following message, "Please select the Payment Term!"

6. The File Requests screen displays the following information:
 - a. File Type (download or upload and program)
 - b. Request Date (date the user made the request)
 - c. Status (status and completion messages)
 - d. User Name (ID of user)
 - e. Aid Program (TSAA Grant, HOPE, HOPE Access or Wilder-Naifeh)
 - f. Term
 - g. D/L (an Icon of a computer disk will be displayed in this column when the file is available for download). The user may click on the icon to download the file.
 - h. If an Agency user, the Selected School will also be displayed on this screen directly above the Status information.
7. The user may “roll-over” the file information, which will be highlighted as they do so, and they may click on any portion of this information (from any column) to review more status or completion information.
8. The File Processing Information screen displays the following information:
 - a. File Date (date of file request)
 - b. File Name (type/aid program/date in the following format:
year/month/day/time.txt)
 - i. If no information is available, the system will display the following message, “No Processing Information Available!”
 - ii. If information is available, the system will display the number of records read, the number of records processed and error message(s).
 - iii. The user may return to the File Requests screen by pressing the [File Requests] button.
9. The layout of the download Certification Roster file is:

Start	Length	Field Name	Table Name	Req.	Field Description
1	1	RecordIndicator	N/A	X	“1” for TSAA Grant (all records in file) “2,3, or 4” for HOPE (“2” for HOPE Only records, “3” for HOPE with GAM records, “4” for HOPE with Supp records) “5” for HOPE Access (all records in file) “6” for Wilder-Naifeh (all records in file)
2	9	SSN	StudentRequired	X	Social Security Number
11	4	ACYear	InstAidProgram	X	Current Academic Year
15	1	RosterType	N/A	X	“C” – Certification
16	1	PaymentTerm	Payments, we will need to change to corresponding value	X	“1” – Summer “2” – Fall “3” – Winter “4” – Spring
17	3	InstTSAACode	Institution	X	3-digit TSAA institution code

Start	Length	Field Name	Table Name	Req.	Field Description
20	14	LastName	AppRequired	X	Last Name
34	12	FirstName	AppRequired	X	First Name
46	1	MiddleInitial	AppRequired	X	Middle Initial
47	4	PaymentAmount	Payments	X	Term Award Amount
51	5	EFCPrimary	AddAdditional	X	EFC
56	1	PaymentStatus			We send the file with this field blank
57	1	EnrollmentStatus	Payments	X	"P" – Part-time "F" – Full-time "H" – Half-time "L" – Less than Half-time
58	1	ProgramType	Payments	X	"1" – 6 month "2" – 1 year "3" – 2 year "4" – 4 year "5" – 3 year
59	8	DateOfBirth	AppRequired	X	CCYYMMDD
67	9	NewSSN	N/A		We send the file with this field blank
76	5	Filler	N/A		Blank
81	5	Cumulative Lottery GPA	Student Benchmark	X	5-digit numeric value for Cumulative Lottery GPA
86	3	Attempted Hours	Student Benchmark	X	3-digit numeric value for Attempted Hours (Prefix with leading zero)

Upload Certification Roster

The purpose is to allow the Agency Administrator or School users to upload the Certification Roster to the e*GRandS system for the TSAA Grant, HOPE, HOPE Access, and Wilder-Naifeh aid programs.

This process was designed to allow the user the opportunity to submit the upload request and review the status at a later time. Additionally, the user will be able to download and review the file(s) they uploaded to ensure accuracy.

Steps:

1. The user selects Certification from the standard menu.
2. The Select a Program screen is displayed.
 - a. If an Agency user, the Select School screen will be displayed.
3. The user selects an aid program.
 - a. TSAA Grant
 - b. HOPE
 - c. HOPE Access
 - d. Wilder-Naifeh
4. The Select Academic Term screen is displayed.
5. The user selects the [Upload Roster] button.

6. The Verify Criteria screen is displayed (which serves as a confirmation screen).
7. The user verifies the Program and Term selected.
 - a. If an Agency user, the user will also verify the School selected.
 - b. The user can make changes as needed before proceeding.
 - c. The user presses the [Upload File button].
8. The File Upload screen is displayed.
9. The user selects the [Browse] button.
10. The Choose File screen is displayed.
11. The user browses to the file they wish to upload.
12. The user selects the [Open] button.
13. The File Upload screen is displayed with the file name of the file they chose to upload.
14. The User selects the [Upload] button.
15. The File Request screen is displayed.
16. The user is redirected to the File Processing Information screen throughout the upload process for status and completion information.
17. From the File Processing Information screen, the user may return to the File Request screen by pressing the [File Request] button.
18. The file is uploaded.

Business Rules:

1. A program is displayed on the Select a Program screen if the agency administrator or school user has security level "400 or 500" for the program.
2. A term is displayed in the drop-down on the Select a Term screen if the current date is greater than or equal to the term's Certification Available date.
3. The [Upload Roster] button is only available for the TSAA Grant, HOPE, HOPE Access, and Wilder-Naifeh aid programs.
4. If the user attempts to upload a file without selecting a term, the system will display the following message, "Please select the Payment Term!"
5. The File Requests screen displays the following information:
 - a. File Type (download or upload and program)
 - b. Request Date (date of the upload)
 - c. Status (status and completion messages)
 - d. User Name (ID of user)
 - e. Aid Program (TSAA Grant, HOPE, HOPE Access or Wilder-Naifeh)
 - f. Term
 - g. If an Agency user, the Selected School will also be displayed on this screen directly above the Status information.
6. The user may "roll-over" the file information, which will be highlighted as they do so, and they may click on any portion of this information (from any column) to review more status or completion information.
7. The File Processing Information screen displays the following information:
 - a. File Date (date of file request)
 - b. File Name (type/aid program/date in the following format: year/month/day/time.txt)
 - i. If no information is available, the system will display the following message, "No Processing Information Available!"
 - ii. If information is available, the system will display the number of records read, the number of records processed and error message.

8. The user may return to the File Requests screen by pressing the [File Requests] button.
9. When loading the record, match on RecordIndicator, SSN, ACYear, PaymentTerm, InstTSAACode, and verify the user executing the upload is a valid user for the institution.
10. Do not allow the upload of the record if the status of the payment is "Paid" with the following exception:
 - a. For the TSAA Grant program, if the payment being updated is "Paid" for payment amount "0" and batch number is "PDSUMMER"
11. Do not allow the upload of the record if the status indicated in the file is BLANK (meaning set to ReadyToPay) and the payment amount field is "0."
12. For the TSAA Grant program only, if the fields EFCPrimary and/or ProgramType in the file match what is on our database (or are blank), the system will update the following fields (if provided in the file):
 - a. LastName
 - b. FirstName
 - c. MiddleInitial
 - d. PaymentAmount
 - e. PaymentStatus
 - f. EnrollmentStatus
 - g. DateOfBirth
13. For the TSAA Grant program only, if the fields EFCPrimary and/or ProgramType in the file are different than what exists on our database, load the record but do NOT update EFCPrimary, ProgramType, PaymentAmount, and PaymentStatus. Update the following fields (if provided in the file):
 - a. LastName
 - b. FirstName
 - c. MiddleInitial
 - d. EnrollmentStatus
 - e. DateOfBirth
14. For the TSAA Grant program only, if the fields EFCPrimary and/or ProgramType in the file are different than what exists on our database, we will provide a report with (this report can be accessed by the Agency Administrator via "System Administration – View Upload Exceptions"):
 - a. SSN
 - b. EFC on database
 - c. EFC in file
 - d. ProgramType on database
 - e. ProgramType in file
 - f. PaymentAmount on database
 - g. PaymentAmount in file
 - h. PaymentStatus on database
 - i. PaymentStatus in file
 - j. School
 - k. Term
 - l. ACYear
15. For the HOPE Access program only, if the record contains a value in "Attempted Hours" other than "001 - < 24" the student will:
 - a. Run through eligibility and become ineligible for "Attempted Hours"
 - b. Message will display on the File Processing interface stating "SSN XXX-XX-XXXX" is not eligible to receive HOPE Access funds this term as they have

reached the 24 hour benchmark. The student will be evaluated for HOPE eligibility and, if eligible, will be on the HOPE certification roster for this term.”

16. A record will be rejected for:

- a. Invalid data values
- b. Invalid data type
- c. No match on SSN
- d. No match on RecordIndicator for the uploaded SSN
- e. No match on InstTSAACode
- f. No match on PaymentTerm
- g. ACYear in record not the current ACYear
- h. PaymentStatus on database is “Paid” for the record
- i. PaymentStatus is not valid for the aid program
- j. PaymentAmount in file “0” and status in file is BLANK.
- k. PaymentAmount in file exceeds the MaximumAward for the aid program
 - i. See Certification section of business rules for MaximumAward amounts per aid program
- l. Required fields not populated

17. A file upload summary will be displayed to the user on the File Processing Information screen: Records Read from File and Records Processed.

- a. If records were not processed, the summary will list the SSNs of the records and the reason.
- b. For the TSAA Grant program only, if records were not completely updated (EFCPrimary and/or ProgramType did not match), the summary will list the SSNs of the records that were not completely updated with a message “SSN xxx-xx-xxxx will be processed and certified manually by TSAC.”

18. The layout of the Upload Certification Roster file is:

Start	Length	Field Name	Table Name	Req.	Field Description
1	1	RecordIndicator	N/A	X	“1” for TSAA Grant (all records in file) “2,3, or 4” for HOPE (“2” for HOPE Only records, “3” for HOPE with GAM records, “4” for HOPE with Supp records) “5” for HOPE Access (all records in file) “6” for Wilder-Naifeh (all records in file)
2	9	SSN	StudentRequired	X	Social Security Number
11	4	ACYear	InstAidProgram	X	Current Academic Year
15	1	RosterType	N/A	X	“C” – Certification
16	1	PaymentTerm	Payments	X	“1” – Summer “2” – Fall “3” – Winter “4” – Spring
17	3	InstTSAACode	Institution	X	3-digit TSAA institution code
20	14	LastName	AppRequired		Last Name – school user may return a different last name than sent – the system will update the LastName field
34	12	FirstName	AppRequired		First Name – school user may return a different first name than sent – the system will update the FirstName field

Start	Length	Field Name	Table Name	Req.	Field Description
46	1	MiddleInitial	AppRequired		Middle Initial – school user may return a different middle initial than sent – the system will update the MiddleInitial
47	4	PaymentAmount	Payments		Term Award Amount – school user may return a different award amount than sent – the system will update the PaymentAmount (For the TSAA Grant program, the PaymentAmount will be updated only if the EFCPrimary and ProgramType match)
51	5	EFCPrimary	AppAdditional		EFC – school user may return a different EFC than sent – the system will NOT update the EFCPrimary

Start	Length	Field Name	Table Name	Req.	Field Description
56	1	PaymentStatus	Payments		<p>Valid for TSAA Grant program: "E" – save PaymentStatus "NotEnrolled" "S" – save PaymentStatus "Unsatisfactory" "O" – save PaymentStatus "Unsatisfactory" "L" – save PaymentStatus "LessThanHalfTime" "I" – (Catch All) save PaymentStatus "LessThanHalfTime" "V" – save PaymentStatus "Over Award" If blank, save PaymentStatus "ReadyToPay"</p> <p>For the TSAA Grant program only, the system will update this field only if the EFCPrimary and ProgramType match</p> <p>Valid for HOPE, HOPE Access, and Wilder-Naifeh programs: "E" – save PaymentStatus "NotEnrolled" "S" – save PaymentStatus "Unsatisfactory" "O" – save PaymentStatus "LeaveOfAbsence" "H" – save PaymentStatus "NumberOfHours" "B" – save PaymentStatus "LeaveOfAbsence" "A" – save PaymentStatus "AppealPending" "I" – (Catch All) save PaymentStatus "LeaveOfAbsence" "V" – save PaymentStatus "Over Award" "N" – save PaymentStatus "NotEnrolled-Ineligible" "D" – save PaymentStatus "Certified No Money" "C" – save PaymentStatus "NonContinuousEnroll" "K" – save PaymentStatus "NonDegreeSeeking" "P" – save PaymentStatus "ProgramComplete" "T" – save PaymentStatus "ViolatedInstSAP" If blank, save PaymentStatus "ReadyToPay"</p>

Start	Length	Field Name	Table Name	Req.	Field Description
57	1	EnrollmentStatus	Payments		<p>Valid for TSAA Grant program:</p> <p>"P" – Part-time "F" – Full-time "H" – Half-time "L" – Less than Half-time "D" – Distance Learning "N" – Not Enrolled "G" – Greater Than Full Time</p> <p>Valid for HOPE, HOPE Access, and Wilder-Naifeh programs:</p> <p>"P" – Part-time "F" – Full-time "H" – Half-time "L" – Less than Half-time "N" – Not Enrolled "C" – Co Op</p> <p>School user may return a different enrollment status than sent – the system will update the EnrollmentStatus</p>
58	1	ProgramType	Payments		<p>"1" – 6 month "2" – 1 year "3" – 2 year "4" – 4 year "5" – 3 year</p> <p>School user may return a different program type than sent – the system will NOT update the ProgramType</p>
59	8	DateOfBirth	AppRequired		CCYYMMDD – school user may return a different date of birth than sent – the system will update the DateOfBirth
67	9	NewSSN	StudentRequired – we may have to add this field to the database, will clarify		If the school user sends a value in this field, they are indicating a changed SSN. We need to work out how this will be handled – it should NOT update the SSN field.
76	5	Filler			Blank
81	5	Cumulative Lottery GPA	Student Benchmark	X	Decimal implied after second digit (ie. 03000 is a 3.00)

Start	Length	Field Name	Table Name	Req.	Field Description
86	3	Attempted Hours	Student Benchmark	X	Valid values for HOPE and HOPE Access: "001" – <24 "010" – 24 "020" – 25 - 47 "030" – 48 "040" – 49 - 71 "050" – 72 "060" – 73 - 95 "070" – 96 "080" – 97 - 119 "090" – 120 "100" – > 120